



County of San Mateo

Inter-Departmental Correspondence

Department: INFORMATION SERVICES

File #: 21-460

Board Meeting Date: 6/8/2021

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors
From: Michael Wentworth, Interim Chief Information Officer, Information Services Department
Subject: Amendment No. 7 to the Agreement with Tyler Technologies, Inc. for the Open Data Platform

RECOMMENDATION:

Adopt a resolution authorizing an amendment to the agreement with Tyler Technologies Inc. (formerly Socrata, Inc.) for Software as a Service, extending the term through June 30, 2023, and increasing the amount by \$420,000 to an amount not to exceed \$2,133,731.84.

BACKGROUND:

On January 29, 2013, the Board of Supervisors approved Resolution Number 072343 directing the County Manager and the Chief Information Officer to develop an Open Data Policy. The Board also adopted Shared Vision 2025 Community Impact Goals and a preliminary set of community indicators to monitor performance and report out on progress. On February 8, 2013, the County entered into an agreement with Socrata, Inc. for a four-month pilot using the Socrata platform to collect and display data provided by various County Departments for public use sharing (i.e. "Open Data") and to monitor performance-based on the County's Community Indicators. The pilot was also used to ensure that a Software as a Service (SaaS model, an externally hosted platform), would work correctly and not slow down performance or otherwise adversely impact the user's experience. On June 18, 2013, the Board of Supervisors approved Resolution Number 072629, waiving the Request for Proposals Process and authorizing an amendment to continue services with Socrata, Inc., increasing the contract amount by \$359,858, and extending the term through June 30, 2015.

On June 16, 2015, the Board of Supervisors approved Resolution Number 073877, authorizing an amendment to continue services with Socrata, Inc., increasing the contract amount by \$413,119.92, and extending the term through June 30, 2017. On June 17, 2016, an amendment was executed to add consulting services for the redesigning of the County's Measure A Dashboard, and to increase the contract amount by \$1,600. On July 20, 2016, an amendment was executed to procure software subscription licensing and support for Socrata, Inc.'s Perspectives software, an online-software based tool, increasing the contract amount by \$22,000 for a new not to exceed amount of \$849,147.92. On June 27, 2017, an amendment was executed to increase the contract amount by

\$444,583.92, for a new not to exceed amount of \$1,293,731.84, and to extend the term through June 30, 2019. On June 25, 2019 the Board of Supervisors approved Resolution Number 076773, authorizing an amendment to continue services with Socrata, Inc., increasing the contract amount by \$420,000, and extending the term through June 30, 2021 and amount not to exceed \$1,713,731.84.

The parties wish to amend the Agreement for the continuation of Software as a Service for an Open Data application, to increase the contract amount by \$420,000.00 for a new not to exceed amount of \$2,133,731.84, and to extend the term through June 30, 2023, with an option to extend the term through June 30, 2024.

DISCUSSION:

With the Board's approval, Tyler Technologies, Inc. will continue to provide services for the Open Data platform, Socrata Connected Government Cloud (SCGC). The SCGC platform provides capabilities for Open Expenditures, Open Budget, Open Payroll, Capital Projects Explorer, and Performance Cloud Optimization. The Open Performance platform hosts dashboards the County uses to show its progress toward its goals in three areas: Shared Vision 2025, Measure K, and department performance. The Open Data Portal currently contains over 400 publicly available datasets and allows users to discover and visualize data in the portal. The Open Expenditures application allows users to view information about County payments over \$5,000. Department staff are using the Open Performance platform for performance reporting through the two-year budget cycle. The Perspectives application allows users to create a narrative around data and tell a story with data, narration and multimedia. The rapid increase in the number of datasets made available through the Open Data Portal and Open Performance is due to the stability of the Socrata platform which hosts all of the County's open data. Continuity of service with the Socrata platform is vital to the ongoing success of the County's data-driven performance reporting and open government efforts.

A 3-year waiver request has been approved by the County's Contract Compliance Committee so that Socrata may continue providing services beyond the County's 3-year contract term limit. The Resolution contains the County's standard provision allowing amendment of County's fiscal obligations by a maximum of \$25,000 (in aggregate).

County Counsel has reviewed and approved the resolution and amendment as to form.

FISCAL IMPACT:

The term for this amendment will extend through June 30, 2023, with an option to extend through June 30, 2024. Funding for this agreement, including this \$420,000 amendment, will come from ISD Service Charges through Core IT. The funding will be included in ISD's Fiscal Year 2021-23 Recommended Budget and subsequent Recommended Budgets.